Report

of the

Select Committee on Tourism

House of Assembly
Nova Scotia

April, 1987

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Select Committee
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Honourable Arthur R. Donahoe, Q.C.
Speaker
House of Assembly
7th Floor
One Government Place
Province of Nova Scotia
Halifax, N. S.

Dear Mr. Speaker:

I am writing in my capacity as Chairman of the Select Committee on Tourism to inform you that the Committee has completed its inquiry into tourism in Nova Scotia.

In accordance with Resolution No. 486 passed by the House of Assembly on May 16, 1985, I am pleased to submit to you the Report of the Select Committee on Tourism.

Respectfully submitted,

R. Colin D. Stewart

R. Colin D. Stewart, M.L.A.
Chairman

EXECUTIVE SUMMARY

Few industries offer to our Province the potential for job creation and economic development of tourism. Currently, this valuable industry employs some **28,000** individuals and brings in direct and indirect revenues of over **$600,000,000** annually. As the numbers of those travelling for pleasure continue to grow, there is every expectation that our Province can anticipate increased employment and higher revenues in the coming years if our tourism industry remains competitive and continues to provide the travelling public those activities and services which it requires.

In 1986, the Select Committee on Tourism issued an Interim Report containing seven administrative and financial recommendations which Members believed could be immediately implemented to improve sectoral performance while the Committee's studies into more detailed questions continued. An underlying theme of the Interim Report was the tremendous potential for economic development which this industry possesses. Committee Members believe strongly that government should recognize this fact by issuing a general policy statement on tourism and by ensuring that adequate and timely funding is available for the marketing and promotions efforts of the Department of Tourism. Other suggestions contained in the Interim Report, such as the introduction of an accommodation grading system and the restructuring of Check Inns, would help Nova Scotia become more responsive to the changing needs of the travelling public. The Members of the Select Committee have noted that preliminary action has been taken on some of these recommendations and urge Government to implement with dispatch the remainder.

In general, the recommendations of the Final Report build on those of the earlier document and fall into three broad categories: marketing/promotions, tourism management and product

development. It is vital that Nova Scotians make improvement in all three areas if our tourism industry is to become stronger and more profitable.

One difficulty which became apparent to the Select Committee in the course of their deliberations was the lack of ongoing communication and co-ordination between many of those departments directly involved in the industry with the Department of Tourism. For this reason, the Select Committee recommends that a **Senior Officials' Working Group** be established to devise promotional and developmental priorities for tourism in a cooperative and cost efficient manner. (III-1)

Since the requirements of the travelling public are changing it is imperative that **improved market research techniques** be instituted to chart the needs of specialty market groups and the resident tourist trade. On the basis of more accurate statistical information, it will then be possible to promote the **growth of new markets** and embark upon **innovative product development** which will lead to the steady **lengthening of our tourist season.** (III-12, III-2, III-4, III-5).

With annual revenues of well over half a billion dollars, tourism is a major contributor to our Province's economic well-being. In order to assist private industry with management and development and to ensure that marketing efforts are maximized, the Select Committee believes it is important that the Department of Tourism assume a greater role in the day-to-day management of the industry. Members therefore recommend the implementation of a **two-year pilot project in which regional tourism representatives** would be appointed to work with local industry and the existing area associations. (IV-12) Once this system were in place, it would be possible to create **destination specific or theme-linked advertising** to encourage longer and more frequent visits. (IV-3)

In order to ensure that Nova Scotia continues to offer those services and activities desired by the travelling public, efforts should be made to **develop new products** including amusements, participatory heritage and multi-cultural activities and cultural activities. (V-3, V-4). In addition, both the public and private sector should consider the creation of a viable **wilderness/adventure** product a priority since this area has been identified as one with maximum growth potential.(V-5).

I - INTRODUCTION

Terms of Reference

On May 10, 1985 notice was given to the House of Assembly that a Select Committee would be struck "to inquire into tourism in Nova Scotia with particular attention to the changing needs and demands of the vacationing public and the continuous encouragement and growth of the tourism industry, and report to this House the observations, opinion, and recommendations of the members of the Select Committee pertaining thereto".[1]

The Select Committee on Tourism was established by Resolution No. 486 which was passed by the House of Assembly on May 16, 1985. The complete text of the Resolution is attached as Appendix C.

Committee Membership

The Members of the Select Committee on Tourism include: the Hon. Thomas McInnis, the Hon. John Leefe, Mr. James Barkhouse, Dr. James Smith, Mr. John Holm, Mr. Paul MacEwan, Mr. Fisher Hudson, Mr. Alexander McIntosh, Mr. John Newell, Mr. Donald G. MacLeod and Dr. Colin Stewart (Chairman).

The staff for the Select Committee on Tourism were seconded from Government Departments. Mrs. Joan Kelly acted as Secretary to the Select Committee, Mr. James Vance served as Researcher to the Interim Report and Dr. Patricia Ripley served in a similar capacity in the preparation of the Final Report.

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1. Hansard, May 10, 1985, p. 2175.

Methodology

Since the Select Committee was struck in May, 1985, some twenty presentations have been heard. The Select Committee on Tourism deeply appreciates the time and effort expended by those individuals and the agencies they represented who appeared before the Committee. A list of the groups which presented briefs to the Select Committee is contained in Appendix D.

Sincere appreciation is also extended to those organizations and private citizens who made representation before the earlier Select Committee on Tourism which was chaired by Mr. Brian Young. The full text of those presentations has been of signal value in helping the Members of the present Select Committee to understand the breadth of the tourism resource across Nova Scotia. A complete list of all briefs presented before the 1982 Committee is contained in Appendix E.

The Interim Report of the Select Committee on Tourism

The evolving nature of the tourism industry presents many complex problems and accordingly, the Select Committee on Tourism decided to submit an Interim Report to the House of Assembly while it continued its research and discussion. This report was submitted to the Speaker in May, 1986 and contained seven specific recommendations which the Select Committee on Tourism believed should be immediately explored while its own deliberations continued.

In general, the Interim Report examined administrative and financial issues which Committee Members believed to be of critical importance. While these concerns will be investigated further in the Final Report, it is the Committee's intention to build its recommendations upon the foundation for administrative change which was laid in the earlier document.

Although the complete text of the recommendations of the Interim Report is contained in Appendix B, a brief summary is produced here for the sake of convenience.

1. The Government of Nova Scotia should adopt a general policy statement on tourism;
2. The Government of Nova Scotia should implement review of all activities which have a direct relationship with the development of the tourism industry;
3. The Check Inns system should be dissolved and incorporated into the Travel Information Division of the Department of Tourism;
4. The Government of Nova Scotia should seriously consider increasing in real terms the marketing budget of the Department of Tourism;
5. The Government of Nova Scotia should promote a one-time additional budget allocation to the Department of Tourism equivalent to its anticipated production costs for the subsequent season;
6. The Government of Nova Scotia should make funding available to Mount Saint Vincent University for its degree program in hospitality;
7. The Government of Nova Scotia should take steps to secure the introduction of a standardized accommodation grading system.

In the intervening months since the publication of the Interim Report, Members of the Select Committee on Tourism have been pleased to note that a number of initiatives consistent with their recommendations have already been undertaken by the Government. These actions represent an important first step in

the reshaping and modernization of Nova Scotia's management of this inexhaustable resource. The recommendations which follow have been framed to foster the continued development and expansion of our Province's tourism industry in a climate which promotes both co-operation and vigor and which recognizes the unique contribution which tourism makes to the economic, cultural and recreational life of our citizens.

II - TOURISM: A CHALLENGE FOR THE FUTURE

Background

Since the Second World War, few resource industries have enjoyed the steady growth of tourism. Despite escalating costs world terrorism and other factors, the percentage of those travelling for pleasure continues to rise. Increased mobility and longer periods of leisure time mean that tourists are travelling further from home and staying longer than ever before. As a result, tourism is currently the world's fastest growing industry and by the year 2000 experts predict that it will be the world's largest industry. Clearly, nations ignore the enormous potential offered by this "renewable resource" at their own risk and the competitive drive is now on to develop new products, improve services and expand markets so as to take optimal advantage of anticipated future growth.

This worldwide trend is accurately reflected in the Nova Scotia experience, where tourism currently offers unparalleled opportunities for job creation and income enhancement. Present estimates place at 28,000[1] the number of jobs which this industry creates for Nova Scotians. Tourism industry revenues in our Province are estimated to exceed $600 million annually.[2] The seasonal nature of the industry means that it is an ideal vehicle for the provision of summer jobs to students and other semi-skilled workers. In addition, the disparate nature of attractions and activities across the Province means that tourism benefits are spread among many regions and since the industry has a low import content, these economic benefits can be focused in local communities for maximum effect.

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1. N. S. Department of Tourism
2. N. S. Department of Finance

Despite these impressive facts, it is clear that if Nova Scotia wishes to remain competitive in world tourism markets, the province must be highly responsive to the demands of a segmented and changing market base. Evolving social values, increased leisure time, higher disposable incomes and greater mobility mean that the type of ritual vacations of a decade ago are no more.[1] A more sophisticated and experienced clientele is demanding a broader range of leisure options, improved services and activity-specific travel packages. If Nova Scotia is not able to compete successfully in these areas, there is real danger that the percentage of the market which the Province now captures will diminish rather than grow and that Nova Scotians will miss the opportunities for job creation and other economic benefits offered by this burgeoning industry.

The Nova Scotian Outlook

There is no reason however why Nova Scotia cannot meet the challenge posed by the evolving nature of the tourism industry. Few areas in the world are as rich in either natural scenic beauty or well preserved and maintained historical sites. The already colourful cultural mix offered by our Acadian, Scots, English and aboriginal heritage has also been greatly enhanced by the contributions of other ethnic groups. Careful protection and restoration policies have meant that our small towns, beaches and other rural areas have maintained their traditional, charming character. In addition, the factors which make our Nova Scotian quality of life so unique also make our Province attractive to potential tourist visitors: respect

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1. As an example, the number of family camping vacations have decreased by almost 54% since 1974. (Voluntary Planning).

for nature, reverence for the past, enthusiasm for the future and longstanding friendliness.

From the industry perspective, the availability of current government programs for the development of small businesses would seem to make Nova Scotia the ideal place to embark upon a tourism venture. In many areas, local seasonal festivals provide foci on which the creative entrepreneur can centre product or service development on a small scale. Tourism ventures are often labour intensive and can offer a wide range of employment opportunities for skilled and unskilled workers alike.

Nevertheless, it is clear that tourism in Nova Scotia is at a crossroads: while our Province is undeniably rich in the human, physical and cultural resources essential to the creation of a highly successful tourism sector, it is imperative that all those in both the public and private sector concerned with this resource must work together to make our industry at once more competitive and more responsive to changing needs.

Concerns Raised in the Hearings of the Select Committee on Tourism

This urgent need to redesign our tourism development and delivery mechanisms was touched on by virtually all of those individuals and organizations which presented briefs before the two Select Committees on Tourism. In total the two Committees received over seventy representations and while many of the individual recommendations may be characterized as mutually exclusive, the theme of **more** careful product development and promotion was apparent in almost all of them. Private and public sector officials were united in their concern that in recent years, the focus of the image of Nova Scotia in the minds of the travelling public has become blurred and that it was necessary to redefine those aspects of our Province which

might be successfully used in tourism promotion.[1] This redefinition was seen as a vital first step in the development of any new tourism strategy.

In addition to this over-riding concern about the public image of the Province, other issues raised in the hearings were of a more substantive but no less important nature. Concern was expressed over the lack of ability of financial assistance options to the prospective tourism entrepreneurs, difficulties in arranging adequate highway signage, the need for government deregulation, quality of service and amenities available, a lack of manmade attractions and amusements and the question of more intense promotion of the Province's multi-cultural heritage.

Many other briefs touched upon the need to integrate "indirect" tourist questions such as heritage preservation, crafts and culture and transportation into any general discussion on tourism promotion. In keeping with the opportunities offered by increased mobility, a number of briefs also identified the need to identify non traditional oversea markets as a priority.

Even those presentations which were locale or activity specific in nature raised at least implicitly some of these wider questions. Far from being repetitious, this emphasis on

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1. It is clear from the presentations that there is conflicting advice on how the Province should proceed in this matter. Some experts believe that Nova Scotia should concentrate more heavily on promoting its attractiveness as an outdoor/wilderness vacation spot, while others believe it is important to stress essentially urban attractions to interest a more sophisticated clientele.

several key questions or themes was invaluable to the Select Committee since it helped Members to assess priorities and establish a research agenda. Understandably, not all of the recommendations made to the Select Committee could be integrated into the Final Report, however, Members have attempted to transmit the scope of the concerns which were expressed to them in the recommendations which follow.

TABLE I

PRESENT FACTORS AFFECTING POSITIVE GROWTH IN THE TOURISM SECTOR

	Trends	Implications
1.	Higher Family Income (s)	- Potential for longer, more expensive vacations
2.	Exchange Rate on U.S. Funds	- More domestic travel - More interest from U.S. markets
3.	Lifestyle Changes	- Growth of outdoor/wilderness market
4.	Heightened Cultural Awareness	- Increased local product consumption
5.	Environmental Concerns	- Growth of interest in interpretative centres, etc.
6.	Increased Mobility	- Potential of growth in overseas markets
7.	Interest in Continuing Education/ Training	- Growth in day tour, activity specific markets.

TABLE II

NUMBER OF SUGGESTIONS TO THE COMMITTEE BY SELECTED TOPIC

	Selected Topic	Number	Percentage
1.	Change Department of Tourism	27	14.2%
2.	Financial Assistance	19	10 %
3.	Government Marketing/Promotion	18	9.5%
4.	Quality of Service/Training	18	9.5%
5.	Attractions	14	7.4%
6.	Highway Signage/Mapping	12	6.3%
7.	Area Associations	11	5.8%
8.	Outdoor Vacations	11	5.8%
9.	Standardized Accommodation Classification	10	5.3%
10.	Government Deregulation	9	4.7%
11.	Taxation	9	4.7%
12.	Revamp Check Inns	9	4.7%
13.	Acadian Concerns	7	3.7%
14.	Transportation	6	3.2%
15.	Heritage/Culture	6	3.2%
16.	Environmental	4	2.1%
	TOTAL	190	** 100

* This table presents the number of recommendations made by selected topics.

** May not equal 100 due to rounding.

TABLE III

SELECTED RECOMMENDATIONS TO THE COMMITTEE BY CATEGORY

Category		Number	Percentage
1.	Service Development	37	19.5%
2.	Government Regulation	28	14.8%
3.	Administrative Change	27	14.2%
4.	Program Development	25	13.2%
5.	Program Delivery	20	10.5%
6.	Promotional	18	9.5%
7.	Other	18	9.5%
8.	Socio-Cultural	17	8.9%
	TOTAL	190	* 100

* May not equal 100 due to rounding.

III - PROMOTING THE RESOURCE

Introduction

Wilderness enthusiasts, regional associations and service sector groups alike were united in their recommendation that the Province must strengthen its commitment to the development of viable marketing and promotional strategies.[1] Suggestions made in the presentations ranged from expanding tourism staff support in the office of the Agent General to developing a comprehensive winter season program. All those who offered these alternatives also stressed the need to increase in real terms the financial commitment to tourism promotion - a commitment which many believed has been eroded by escalating costs and a devalued Canadian dollar.

Accordingly, marketing and promotion served as a major focus of the Interim Report. In that document, Committee Members urged the Province to increase its promotional budget in real terms and to consider the one-time budget allocation of monies which would allow production and distribution time constraints to be overcome. It was suggested that these measures would go a long way to help Nova Scotia regain its competitive edge in attracting visitors from each category of the highly segmented tourism market. Unless the Province is able to meet this challenge, there is a real danger that Nova Scotia will fall behind other tourist destinations which respond more flexibly to the needs of diverse sub-markets.

Despite these earlier recommendations about improved marketing capacity, it is clear to Committee Members that the question of promotion is a crucial and complex one which

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1. The Interim Report, pp. 12-13

merits further serious study. The sheer variety of recommendations made before the two Select Committees suggest that there exists a certain ambiguity about the elements of Nova Scotia which should be highlighted in promotions. Several presentations recommended abandoning winter promotions, while others stressed the need to intensify these efforts. Many briefs commented favourably upon the rural charm and special appeal of the Province's small towns while others urged that the Province should begin to market the advantages of Nova Scotia's cities and cultural life more aggressively. It seems evident that some understanding about the nature of our Provincial image must be reached before renewed marketing and promotional efforts are initiated.

At the same time, there also seems to be some difficulty in determining what specific areas should be targeted for new promotional efforts. Some groups advocate special campaigns aimed at increasing vehicular traffic from the United States, others want to increase Nova Scotia's volatile share of the lucrative tour package market while still others want to see an effort made to carve a larger niche in the oversea trade. Given the differing economic impact of visitors from these areas, it is imperative that a set of objectives be established which would assist both public and private tourist ventures in determining where the areas for growth lie and what can be done to optimize Nova Scotia's chances in competing for tourist dollars.[1]

A long-standing obstacle to the development of an integrated marketing and promotions plan has been the lack of

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1. This is a question of some significance, since recent figures suggest that a European tourist is worth approximately four times a U.S. tourist to the N.S. economy. (TIANS, 1985)

co-ordination between those government departments which play a role in the management of the tourism sector. While the Department of Tourism has as its main responsibility the implementation of marketing and promotional strategies, other departments have authority to make funding and development priorities which may not be in the best interests of the industry. It is imperative that this paradox be immediately addressed so that long-range planning may proceed in a co-ordinated fashion.

Recommendation

In the Interim Report, the Select Committee recommended that government undertake an immediate review of all activities which have a direct relationship with the development and promotion of tourism in the Province. In order to facilitate this process and to assist in the development of short-term marketing priorities, the Select Committee believes that the creation of a working group of senior officials[1] from the Departments of Education, Culture, Recreation & Fitness, Lands and Forests and Development should be established under the chairmanship of a senior official of the Department of Tourism. This working group would strive to ensure that all promotional, marketing and development priorities which impact upon the tourism industry are efficiently and cost effectively implemented and that an up-to-date and comprehensive inventory of all attractions and tourism resources in the province is maintained.

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1. The Select Committee recommends that membership in the working group be restricted to officials of director level or above.

Determining the Product

No matter how sophisticated or expensive, promotional and marketing strategies can never be successful unless the product which they are designed to highlight is one which appeals to, or fulfills a need for, the marketplace. A priority for Nova Scotia should be the immediate focusing on target areas for product development and promotion. While the Minister's Advisory Council on Tourism and private sector groups can assist in the search for long term priorities, the Select Committee has identified a number of areas where short term initiatives can be taken - initiatives which will provide not only increased economic revenue but will also create a stronger more viable foundation for the industry as a whole.

Lengthening the Season

Traditionally, the provincial tourist season has been a short one, with the bulk of events and advertising aimed at the July and August period. While it is essential that these eight weeks serve as the nucleus for tourism planners, efforts should be made to increase the shoulder seasons in May/June and September/October. With the changing travel patterns of the 1980's, it is becoming less necessary to promote the summer months exclusively: senior citizens, couples and singles could patronize our hotels, campgrounds, golf courses and historic sites in the off periods; indeed, there is every expectation that diminished crowds might make these activities more pleasurable in June or September than at the peak of the season.

Recommendation

The Department of Tourism should promote more intensively the activities and opportunities open to visitors in the

shoulder seasons and should encourage area associations to schedule festival events and special interest projects for these time periods with the long-range view of creating a viable shoulder season.

The private sector can play a role in this expansion process. Hotel operators can offer special shoulder season packages and devise indoor activity weekends, etc. for times in the very early or late season when changeable weather may make the scheduling of outdoor programs uncertain. These activities could range from chess tournaments to mystery weekends, wine tastings and gourmet cooking classes. Attractive packaging of these events would help to extend the season into May and October and would also make Nova Scotia more competitive in the increasingly segmented and sophisticated specialty market.

Recommendation

Working through the regional associations, the Department should encourage the hotel/resort/convention sector to develop and introduce new products which will result in the lengthening of the season and the broadening of leisure activities available across the Province.

Creating a Winter Season

An important component in the expansion of the tourist season within the province is the creation of a viable and exciting winter season. For some years private sector entrepreneurs and the Department of Tourism have been involved in the promotion of ski-related activities in Cape Breton and other sites across the Province. Building on the splendid impression made across Canada at the 1987 Winter Games, the Province should begin to promote the entire province as an area where winter activities can be enjoyed in a setting of

unspoiled, tranquil beauty. In those areas where neither cross-country trails nor down-hill skiing is possible, other activities such as sleigh-riding, snow-shoeing, sugaring off and winter orienteering could be promoted. These projects are ideally suited to Nova Scotia because they offer small business, country inns and farmers an opportunity to create a seasonal mini-business at little start up cost.

Recommendation

In conjunction with the Department of Lands & Forests, the Department of Tourism should explore the possibility of establishing marked and graded trails for winter activities in provincial parks and in the environs of the provincial resort hotels on the mainland.

Recommendation

Working with the Departments of Agriculture and Development, the Department of Tourism should promote winter opportunities and assist with advice, those entrepreneurs who wish to develop sugar bush activities, sleigh rides and other appropriate seasonal pastimes consistent with the Government's plan to create a province-wide winter season.

Targeting the Wilderness Market

Although the issue of the wilderness adventure market will be more fully treated in Chapter V, it is appropriate to raise the question in relation to the pivotal role which such activities can play in expanding the tourist season. The full range of wilderness vacations spans a time frame from early spring into winter, creating a virtually "seasonless" market in

this the most fast-growing of leisure choices.[1] If creating an all-round tourist season is to be a serious priority, it is evident that immediate steps must be taken to expand Nova Scotia's share of the outdoor/adventure market.

Recommendation

As an immediate priority, the Department should begin aggressive promotion and expansion of the wilderness market with a view to expanding Nova Scotia's share of this fast-growing leisure option.

Spotlighting our Multicultural Image

Tourism analysts predict that in addition to the wilderness/adventure market, Nova Scotia can expect a significant growth in visitors who wish to explore the province's unique multi-cultural heritage.[2] As such highly successful promotional campaigns as "Old Home Summer" have shown, more individuals and families are wanting to find out about their ancestors and to see first-hand some of the sights and artifacts which may have been familiar to their grandparents.

This trend is further heightened by the fact that in a province the size of Nova Scotia, it is possible to experience widely differing cultural traditions within a small area. In an easy day's drive it is possible to visit Pictou, home of an important Scottish tradition, the Annapolis Valley, settled by both the Anglo-American planters and the Acadians and to experience the hearty warmth of the Lunenburgers. Seasonal cultural festivals and events sponsored by other ethnic groups

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1. Department of Tourism, November 25, 1986
2. Department of Tourism, November 25, 1986

in the province also contribute to this lively mix. In an era when many are anxious to explore and experience other cultural traditions, the advantages of our Province can prove a solid basis on which to build opportunities for tourism development.

Nowhere is the opportunity for tourism growth via cultural activity better reflected than in the province's successful experience as host of the International Gathering of the Clans. Although Nova Scotia has sponsored these events only twice to date, the Province has quickly gained an international reputation as a well organized, accommodating and dynamic host locale. Response within the Province to the Gatherings has been great and has spawned the creation of several special events across Nova Scotia which have now become annual projects. The Nova Scotia Tattoo, now established as the finest program of its kind in the world, was first devised as part of the opening festivities of the first Clan Gathering in 1979. The Tattoo now serves as a focal point for the beginning of the annual tourist season - pushing back the opening of the season by about two weeks. This high-profile and superbly organized event has become one of the major events in the province's cultural calendar.

Recommendation

The Department of Tourism should continue to support and actively promote the Nova Scotia Tattoo as one of the province's most renowned tourist attractions and program planners of the Tattoo should be encouraged to continue incorporating performers in the Tattoo schedule who are representative of the province's cultural mosaic.

In addition to stimulating self-generating projects like the Nova Scotia Tattoo, the International Gathering of the Clans has encouraged a fairer distribution of tourist dollars

across the province. By holding a majority of events outside the metropolitan areas, the Gathering is helping to ensure that many small communities enjoy the benefits of visitor spending and that many small businesses have an equal opportunity to profit.

The International Gathering has also provided an important mechanism of promoting increased public and private sector co-operation. Several important firms have adopted a "tied in" advertising strategy which compliments the Scottish theme of the Gathering and have produced promotional literature, media spots and other useful advertising components which intensify the value of the Department of Tourism's own promotional budget. For Clan Gathering 1987, a local travel operator is offering special Nova Scotia packages for both the American and British markets. An added benefit of this locally organized approach to product marketing is that Nova Scotians will learn the skills necessary to compete in the tour package market which has previously been dominated by non-Canadians.

Recommendation

The Department of Tourism should encourage the growth of more co-operative endeavours with private industry to ensure that all avenues for product promotion are explored.

Multicultural events like the Gathering of the Clans, the Acadian Festivals and the Indian Summer Games are especially attractive because in many cases, there is a readily identifiable clientele who can be reached by a variety of traditional and non-traditional marketing tools. On site promotions at other ethnic festivals of a similar character can help determine the level of interest in an upcoming event. Advertising in special interest magazines is often less expensive but more effective than non-specific, mass market campaigns. Many

individuals who attend ethnic festivals may have a long-standing interest in these cultural activities and may thus be disposed to return on an annual basis should the calibre of the program and services offered be satisfactory.

Recommendation

Given the potential cultural and tourism value of Nova Scotia's multiculturalism festivals, the Department of Tourism should undertake an immediate review of all such festivals and activities held across the Province. The review team should include representatives from the Department, the Multicultural Association of Nova Scotia, the area associations and private industry who will assess the possibilities offered by this developing market and will prepare a recommended action plan for updating, improving and expanding the activities currently offered by the multicultural associations and will suggest ways in which these festivals may be used to expand the spring and fall shoulder seasons.

Recommendation

Once the review team has prepared its recommended action plan, meetings with representatives from the multicultural groups in the Province should be held under the sponsorship of the Department of Tourism to explain the goals of the plan and to suggest ways in which agencies which are willing to participate in the development process can begin to refocus their priorities and long-term goals.

Recommendation

On the basis of the recommendations of the review team, and assistance from the Interdepartmental Working Group, the Department of Tourism should assess its own priorities in on-site promotion and group specific advertising.

Research and Planning

It is clear that the major recommendations concerning length of season, festival promotion and group specific marketing campaigns can only be successfully implemented with the assistance of a vigorous research and planning support program. Currently, the Marketing and Promotions Division of the Department of Tourism enjoys a well deserved reputation for excellence: it is the hope of the Select Committee that this strong foundation can be expanded and refined in the years ahead.

Almost ten percent of groups which appeared before the two Select Committees stressed the need for Government to continue and improve its tourism research efforts.[1] While many briefs singled out the professionalism and high calibre of the Marketing and Promotions staff, there was a consensus that additional monies should be made available to support the research function. This concern was reflected in the recommendations of the Interim Report. In that document members of the Select Committee addressed the question of providing more realistic advertising budgets and the problem in planning caused by discrepancies between the fiscal and tourism season years.

Although Committee members still believe that these measures constitute a vital part of any competitive provincial tourism strategy, they have identified a number of other key areas where improvements to current practices may be made.

Methodological Practices

At the present time, the biennial visitor profiles

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1. See p. 11

conducted by the Department of Tourism provide the Province with an accurate record of the past season. As goals and priorities for the industry begin to evolve however, there is some concern that established methodologies will not be able to provide the range of data required for comprehensive planning. Clearly, new stastistical information will be necessary as Nova Scotia updates its approach to aggressive marketing.

Recommendation

The methodology of the visitor profile and exit surveys should be redesigned so that a more accurate picture of travel patterns in both Nova Scotia and the Atlantic region can be derived. While Committee Members recognize that these changes may result in higher research costs, they believe that the benefits of a complete record more than offsets the anticipated additional costs.

The Resident Tourist Market

Another issue which came to light in the discussion of research methodologies was the question of how to track resident tourist patterns. Although this large market represents an annual figure of some one hundred and fifty million dollars[1] to the province, demographic trends, service preferences and development potential for this group remain largely unexplored.

Recommendation

In order to study, develop and promote the resident tourist market more aggressively, the Department of Tourism

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1. Statistic courtesy of the Department of Tourism

should consider the adoption of expanded methodologies which would permit thorough charting of this hitherto unexplored market.

Multi-cultural and Festival Research

As outlined elsewhere in this chapter, the cultural market has been identified as an important area of growth for the Nova Scotia tourism industry. The possibilities for sophisticated and comprehensive marketing promotions involving both the private and public sectors are great and the probability of repeat visitors for specific events is also good.

Experience, most notably with the planning of the biennial International Gathering of the Clans, has shown that many cultural or multi-cultural events, even if they have been to some degree artificially fostered or developed, may ultimately take root and function as self-generating entities. The effects of these new endeavours (revenue, employment opportunities, etc.) is all the more enhanced by the fact that these events do not have to rely on urban centres and can thus be created in any community in the province which wishes to promote its local history, customs or ethnic background.

Experience has also proven that the expectations of visitors to such special events are high: if these expectations are not fulfilled, there is a strong chance that the tourist will leave Nova Scotia disappointed or unsatisfied. It is therefore imperative that before the province seek to expand the scope of multi-cultural or community festivals, it take careful stock of what visitors to these events specifically anticipate from such an experience.[1]

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1. See recommendation III-9.

Convention Business

The increasingly lucrative convention business is another area of the tourism industry where there is potential for growth. It is crucial that Nova Scotia be in a position to offer prospective conventioneers the range of activities and services which they desire. Given the excellence of convention facilities across the province, this careful focusing on services and activities could prove to be the decisive factor in whether agencies and groups choose Nova Scotia as a convention destination.

Recommendation

In order to improve Nova Scotia's competitive position in the convention trade, the Departments of Development and Tourism should encourage local tourist associations in consultation with Boards of Trade, Chamber of Commerce groups, and other appropriate agencies to conduct objective reviews of services and activities available to prospective conventioneers in their respective communities with a view to upgrading these services as appropriate.

Planning

The value of even the most comprehensive research will be diminished unless adequate planning mechanisms are in place to transform knowledge into decisive action. Department of Tourism planning for the upcoming tourist season in Nova Scotia began at an earlier date in the preceding year than in the past. The benefits of this approach are obvious: availability of prime spots in print media, longer time for the development of cross-sector promotions, etc. These efforts must continue to be made as early as possible and must be widened to include area associations and local groups.

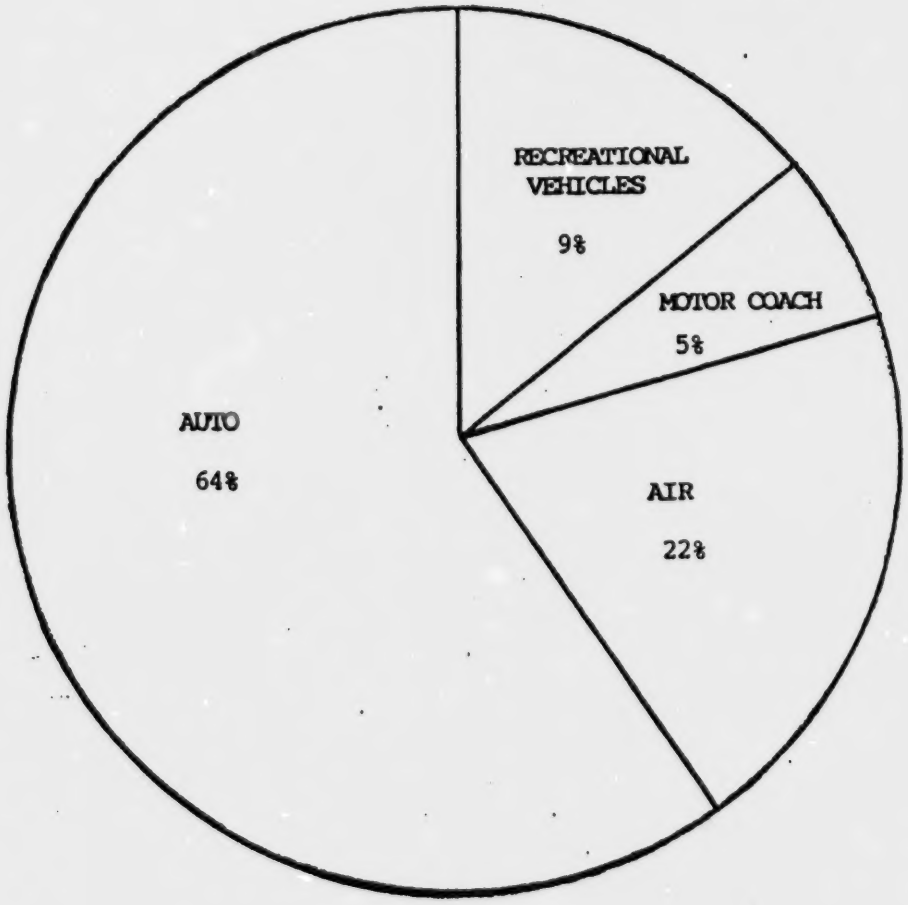
Recommendation

Every effort should be made to encourage local groups and area associations to begin planning as far in advance as possible so that the most efficient use of performers, advertising monies and promotion can be achieved.

TABLE I

VISITOR VOLUME SHARES BY MODE OF TRANSPORTATION*

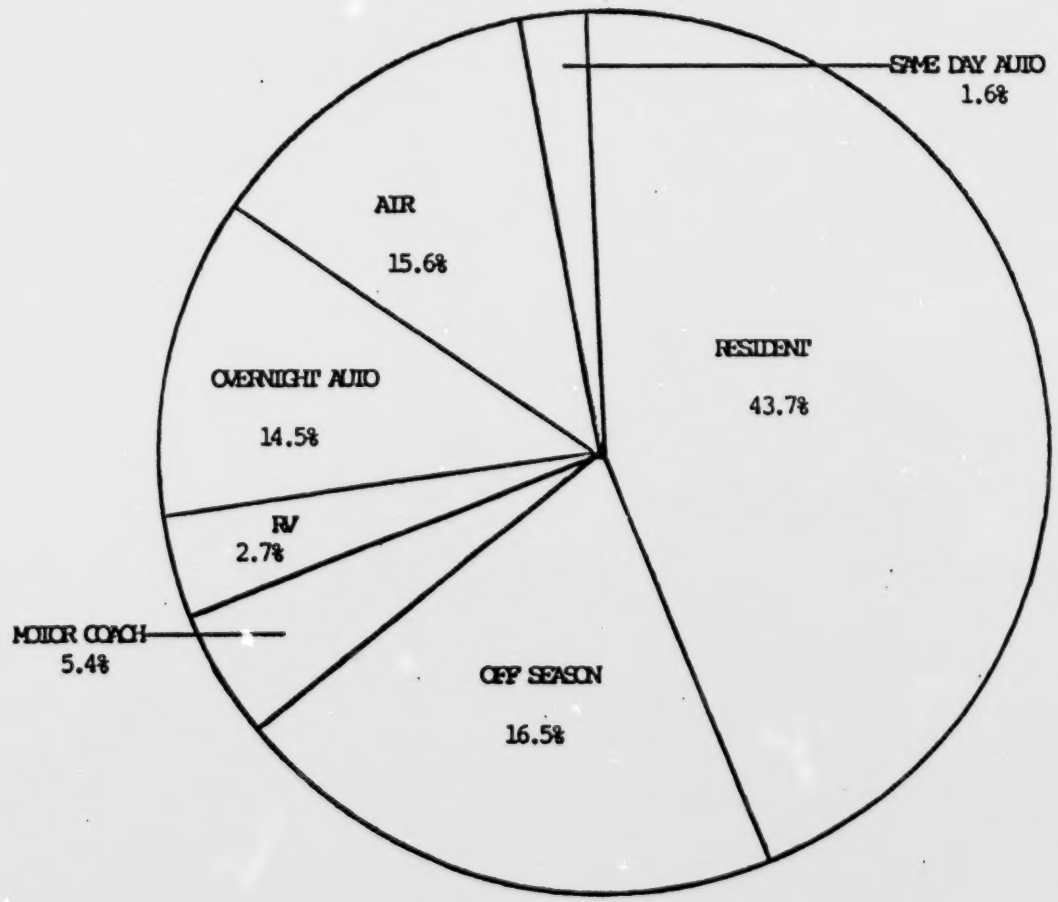
1985



* Courtesy of the Department of Tourism

TABLE II

1985 TRAVEL REVENUES BY SOURCE*



The total revenue generated by tourism in Nova Scotia during 1985 is approximately $600 million

The NON RESIDENT component is $337.7 million or 56%

* Courtesy of the Department of Tourism

TABLE III *

VISITOR PROFILE: DEMOGRAPHICS FOR 1984**

Visitor Parties	481,000
Life Stage	(% Parties)
Bachelor	4%
Single Family	2%
Young Couple	18%
Young Family	12%
Middle Family	13%
Older Family	10%
Grown Family	11%
Older Couples	10%
Retired Couples	15%
Solitary Survivor	5%
TOTAL	100

N.B. - The total of single, childless and retired visitors to the Province in 1984 equalled 54%.

* Statistics courtesy of the Department of Tourism.

** Visitor Profile studies are conducted in every second year only.

TABLE IV*

VISITOR PROFILE: EXPENDITURES IN 1984**

	All Visitors	Auto	RV	Air
Expenditures				
Average Party Per Trip Expenditure	$400	$290	$408	$545
Per Diem Party Expenditure	$69	$58	$63	$88
Per Diem Person Expenditure	$39	$27	$26	$62
TOTAL EXPENDITURE	$192,060,000	$84,810,000	$15,504,000	$91,746,000

* Courtesy of the Department of Tourism.

** Visitor Profile Surveys are conducted in every second year.

TABLE V*

VISITOR PROFILE SATISFACTION ANALYSIS**

Estimated Total Parties	481,000
Future Intent	**(% parties)**
Visit Again	94%
Not Again	3%
Uncertain	3%
Friends/Neighbours/Relatives	**(% parties)**
Recommend	97%
Not Recommend	2%
Uncertain	1%
Previous Visits	**(% parties)**
Never Before Visited N. S.	24%
Visited Over Year Ago	38%
Visited Within Last Year	38%

* Statistics Courtesy of the Department of Tourism.

** Visitor Profile Surveys are conducted in every second year.

RECOMMENDATIONS CONTAINED IN CHAPTER III

Recommendation III-1

In the Interim Report, the Select Committee recommended that government undertake an immediate review of all activities which have a direct relationship with the development and promotion of tourism in the Province. In order to facilitate this process and to assist in the development of short-term marketing priorities, the SelectCommittee believes that the creation of a working group of senior officials from the Departments of Education, Culture, Recreation & Fitness, Lands and Forests and Development should be established under the chairmanship of an official of the Department of Tourism. This working group would strive to ensure that all promotional, marketing and development priorities which impact upon the tourism industry are efficiently and cost effectively implemented and that an up-to-date and comprehensive inventory of all attractions and tourism resources in the province is maintained.

Recommendation III-2

The Department of Tourism should promote more intensively the activities and opportunities open to visitors in the shoulder seasons and should encourage area associations to schedule festival events and special interest projects for these time periods with the long-range view of creating a viable shoulder tourist season.

Recommendation III-3

Working through the regional associations, the Department should encourage the hotel/resort/convention sector to develop and introduce new products which will result in the

lengthening of the season and the broadening of leisure activities available across the Province.

Recommendation III-4

In conjunction with the Department of Lands & Forests, the Department of Tourism should explore the possibility of establishing marked and graded trails for winter activities in provincial parks and in the environs of the provincial resort hotels on the mainland.

Recommendation III-5

Working with the Departments of Agriculture and Development, the Department of Tourism should promote winter opportunities and assist with advice, those entrepreneurs who wish to develop sugar bush activities, sleigh rides and other appropriate seasonal pastimes consistent with the Government's plan to create a province-wide winter season.

Recommendation III-6

As an immediate priority, the Department should begin aggressive promotion and expansion of the wilderness market with a view to expanding Nova Scotia's share of this fast-growing leisure option.

Recommendation III-7

The Department of Tourism should continue to support and actively promote the Nova Scotia Tattoo as one of the Province's most renowned tourist attractions and program planners of the Tattoo should be encouraged to continue incorporating performers in the Tattoo schedule who are representative of the province's cultural mosaic.

Recommendation III-8

The Department of Tourism should encourage the growth of more co-operative endeavours with private industry to ensure that all avenues for product promotion are explored.

Recommendation III-9

Given the potential cultural and tourism value of Nova Scotia's multiculturalism festivals, the Department of Tourism should undertake an immediate review of all such festivals and activities held across the Province. The review team should include representatives from the Department, the Multicultural Association of Nova Scotia, the area associations and private industry who will assess the possibilities offered by this developing market and will prepare a recommended action plan for updating, improving and expanding the activities currently offered by the multicultural associations and will suggest ways in which these festivals may be used to expand the spring and fall shoulder seasons.

Recommendation III-10

Once the review team has prepared its recommended action plan, meetings with representatives from the multicultural groups in the Province should be held under the sponsorship of the Department of Tourism to explain the goals of the plan and to suggest ways in which agencies which are willing to participate in the development process can begin to refocus their priorities and long-term goals.

Recommendation III-11

On the basis of the recommendations of the review team, and assistance from the Interdepartmental Working Group, the Department of Tourism should assess its own priorities in on-

site promotion and group specific advertising.

Recommendation III-12

The methodology of the visitor profile and exit surveys should be redesigned so that a more accurate picture of travel patterns in both Nova Scotia and the Atlantic region can be derived. While Committee Members recognize that these changes may result in higher research costs, they believe that the benefits of a complete record more than offsets the anticipated additional costs.

Recommendation III-13

In order to study, develop and promote the resident tourist market more aggressively, the Department of Tourism should consider the adoption of expanded methodologies which would permit thorough charting of this hitherto unexplored market.

Recommendation III-14

In order to improve Nova Scotia's competitive position in the convention trade, the Departments of Development and Tourism should encourage local tourist associations in consultation with Boards of Trade, Chamber of Commerce groups, and other appropriate agencies to conduct objective reviews of services and activities available to prospective conventioneers in their respective communities with a view to upgrading these services as appropriate.

Recommendation III-15

Every effort should be made to encourage local groups and area associations to begin planning as far in advance as possible so that the most efficient use of performers, advertising monies and promotion can be achieved.

IV -- MANAGING THE RESOURCE

Introduction

As the preceding pages have emphasized, the tourism industry has the potential to impact on all Nova Scotians and their communities. Although improved marketing and promotions are crucial to future development, effective resource management requires that individual operators and officials from all three tiers of government work together in a concerted effort to create an environment in which the industry can flourish.

This united approach to problem solving is all the more important when the scope of problems is considered. Over the course of their meetings, Committee Members identified many important areas where there was room for considerable improvement. Some of these sectors - notably transportation and customs procedures - do not lie within the Province's jurisdiction; however, there is real hope that working in concert with the private sector and other levels of government, Nova Scotia will be able to effect the desired changes.[1]

Step by step planning is also required by all governments in the formation of long-range development and cultural strategies. Since a large part of the monies for development and multi-culturalism must come from the Federal Government, it is vital that the Province ensure that an adequate communication link exists whereby Nova Scotia's special needs can be effectively transmitted. Similarly, since many visitors to Newfoundland and Prince Edward Island are in some senses "captives of the Nova Scotia market" for at least part of their journey, it is imperative that vigorous efforts to promote regional planning be made.

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1. See below, recommendation IV-8

Recommendation

In order to ensure that Nova Scotia can maximize its access to developmental and multicultural funds available through the Federal Government of Canada and in order to ensure that a complimentary management and promotion strategy exists within the Atlantic region, the Province of Nova Scotia should undertake a review of all information and communication linkage which directly or indirectly relates to Tourism. The final aim of this review would be the fostering of renewed ties between provinces in the region and the building of a greater Federal awareness of the particular needs Nova Scotia in the tourism sector.

Intra-Governmental Co-Operation

It is evident that there also exists an urgent need to improve and promote communications within those provincial government agencies responsible for the tourism product. At the present time the Departments of Lands & Forests, Culture, Recreation & Fitness, Education, Transportation and Development play a critical role in creating the welcoming environment which Nova Scotia offers its visitors. Often the priorities and strategies of the departments are set without reference to the requirements of the tourism industry. Thus, anomalies have been allowed to exist wherein one department will abrogate its responsibilities for the funding and management of an important event, thereby forcing the Department or Tourism to step in and shoulder the burden.

While there can be no perfect solution to this problem without the drastic re-shaping of government departments and their responsibilities, Committee Members hope that the creation of an Inter-departmental Working Group of senior officials will lessen the difficulties and will ultimately promote

improved co-operation. Closer working communication between the government departments is an essential first step in improved and competitive tourism management.[1]

The Role of the Province

Under the existing arrangement, the Province of Nova Scotia plays a somewhat ambiguous role in the management and development of the tourism resource. Despite the tremendous potential of the industry for job creation and community development, the mandate of the Department of Tourism is a restricted one which focuses largely on "generic" advertising, special promotions and other marketing-related programs. What is missing from the Department's role is a specific mandate to assist in on-site development and problem-solving.

Conventional thinking has always promoted the idea that the tourism industry is its own best developer and manager.[2] While Committee Members do recognize the tremendous efforts which the industry has made working through the various area associations, they believe it is imperative for the Province to play an expanded role in the development and management of the tourism sector. By expanding the mandate of the Department of Tourism to include development, training and local promotions, the Province would be doing much to ensure that our industry remains competitive and goal-oriented as we approach the year 2000.

Area Associations

Currently, eleven area tourist associations exist across

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1. See recommendation III-1.
2. Presentation of TIANS, October, 1985.

Nova Scotia. Each of them has made at least one appearance before the Select Committee and each has presented its own view of what would be best for local development within the industry. Committee Members have been impressed by the enthusiasm, professionalism and optimism of these strategies. Nevertheless when examined together, these regional plans present a picture which is fragmented and discrete and in which the potential for internal competition is always present. Clearly, this separateness and diversity inhibits rather than helps future industry development across all of Nova Scotia.

Under present funding arrangements, area associations receive the major portion of their monies from the Province and use them as appropriate to promote and develop the industry within their area. Each area association is independent of the others and pursues its own specific objectives within the loosest of general planning frameworks. While this system has allowed for a certain degree of flexibility and local colour in area programming, it has meant that areas are, in effect, in direct competition with one another for tourist dollars and that needless duplications of effort and spending can occur.

In order to ensure that the Province as a whole gains the maximum benefit of anticipated future growth in the industry, Committee Members believe that it is imperative for the Department of Tourism to play an expanded role in the determination and implementation of area policies. This new role would not be that of a central agency dictating to the regions, but would be that of a decentralized co-ordinator or facilitator, helping to make expectations and long-range plans achievable realities. This approach has worked very well in other Canadian jurisdictions and within Nova Scotia the local representatives of the Departments of Agriculture and Development are widely recognized as integral components of successful community development.

These representatives would be resident in the regions which they served and would be responsible for assisting communities and individual operators with both development and management plans. As a pilot project, Members of the Select Committee would like to see two regional tourist representatives appointed to serve the Province for a trial period of two years. Combining the expertise of the departmental representatives with the experience of the area associations will do much to boost the role of tourism in community development.

Committee Members recognize that this suggestion is a radical one which if adopted would dramatically alter the role of the Department of Tourism. The Select Committee believes however that it is necessary to take this step so that the full potential of the tourist industry in Nova Scotia can be more readily achieved.

Recommendation

In order to serve the needs of local communities, tourists and operators, the Department of Tourism should assume an expanded role in day-to-day tourism management. As a pilot project, the Department should appoint two regional representatives whose job it would be to work in local communities with the area associations in the development and management of ongoing operations.

Destination Promotion

It is clear that the creation of the regional tourist representative system would result in major changes in the way in which Nova Scotia's tourism resource was managed. It is expected that one of the first tangible benefits of the new system would be in the lessening of competition between the regions and in the creation of a more co-operative environment

for development. Another area where the adoption of the new approach would lead to impressive results is in the field of destination promotion.

Currently, the province advertises only to bring people to Nova Scotia or to promote some specific event like the upcoming International Gathering of the Clans. Once the tourist arrives, he or she must choose between the differing attractions and packages which each association prepares for its own region. The regional representative system would change this situation in two distinct ways. Since the representative would be responsible for several local jurisdictions he or she could help communities work together more effectively in planning visitor packages which would attract tourists to several areas rather than to one location. This approach would ultimately result in increased and more equitably shared economic benefit for all regions.

Secondly, since the representatives would all be linked through the Department of Tourism, special cross-regional packages would be designed joining one or more region by a specific theme. In this approach, advertising could be developed joining Cheticamp, Grand Pre and Pubnico in a special Acadian package; similar programs could be developed for sport fishing, crafts and other areas of interest such as sailing, where the potential of creating a strong sub-market is high. An added attraction of destination specific advertising is that it is possible to aim for greater frequency of visit and/or longer stay.

Recommendation

Once the new regional representative system is in place, the Department of Tourism in conjunction with area associations should take immediate steps to introduce destination specific

advertising campaigns which would compliment their generic promotions. This program should be introduced gradually and in time should expand to cover the province with a network of destination/theme options developed in concert with local industry and community agencies.

Accommodation

One of the issues which the Select Committee on Tourism addressed in its Interim Report was the introduction of a standardized accommodation grading system. Such a system would rank the registered hotels, motels, tourist homes and cabins by category. Evidence from the hearings and input from the travelling public at large indicates that the demand for this type of a ratings system is steadily growing. At a time of rising costs, tourists need to be assured about quality and value long before they arrive at our borders. The imposition of certain minimum standards by category coupled with the publication of the rating could in itself be a powerful incentive for less scrupulous operators to improve their premises. The Committee Members wish to stress that the recommendation on accommodation grading contained in the Interim Report is a timely and necessary measure which the Department of Tourism should pursue with vigour.[1]

Since the preparation of the earlier document, Committee Members have also been studying the question of extending ratings and minimum standards to bed and breakfast operations. While bed and breakfasts with over three rooms have to be licensed and are therefore eligible for inclusion in the rating system, there are a number of smaller operations for which there is at present no requirement for registration. After

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1. See recommendation seven of the Interim Report.

considerable reflection, the Select Committee feels it would be inappropriate to recommend that the small bed and breakfasts be included in the licensing system unless individual operators so wish. Area associations and the regional representatives have an informal role to play in encouraging operators to maintain adequate standards. By imposing an additional layer of bureaucracy on the small, strictly seasonal bed and breakfasts, the Province might well be forcing some out of existence, thus depriving the travelling public of a unique opportunity to experience the special character of Nova Scotian hospitality which can only be found in such informal settings.

Human Resources

As mentioned elsewhere in the Report, the traditions and temperament of Nova Scotians make them ideally suited to be at the forefront of Tourism development. The Province's history in the establishment of small business is excellent, our citizens are friendly and hospitable and our labour pool contains large numbers of students and semi-skilled workers who are well fitted to the seasonal nature of most work in the industry.

Working together, Government and industry have attempted to achieve a good balance of joint action in training and human resource development programs. Although the Province has not proclaimed the Hospitality Institute of Nova Scotia Act, TIANS has moved in to establish the Tourism and Hospitality Institute of Nova Scotia. The role of this important agency can be pivotal in providing our Province with a cadre of well-trained professionals who will serve as the nucleus for future industry development. At the same time, the recently established co-operative degree program in Tourism at Mount Saint Vincent University will make it possible for Nova Scotians to assume a leadership role in tourism management and development. Both

these examples of private sector initiative are to be applauded since they represent an encouraging trend of self-initiative.

One area where human resource development programs are needed is in the field of server training. As the travelling clientele becomes more sophisticated, it will demand informed, courteous service about food and wine selection. Committee Members feel that it is therefore important that renewed efforts to be made to provide on-going server training and that operators be encouraged to make training time available to staff members. The regional tourist representative system would greatly facilitate the training process. The recently announced provincial initiative on community colleges could also prove significant from this perspective since the colleges could serve as the focus of community-led and directed training projects across the province.

Recommendation

Building on the opportunities offered by the regional representative system the Department of Tourism should re-activate its server training program and investigate updating course material to reflect the changing demands of the travelling public.

Throughout Atlantic Canada there are a number of fine professional training programs relating to the hospitality industry which are offered at community colleges, vocational schools and other advanced training centres. At the present time, no mechanism exists whereby graduates of these courses can be compared. A qualified chef may possess a certificate, a diploma or an accreditation paper: industry operators are left to sort out for themselves which credentials are appropriate and an arbitrary insistance on a diploma may deny qualified applicants a chance for a new job. In order to end such

inequalities, every effort should be made to ensure that training programs in the region are reviewed and that comparable accreditation equivalencies be set.

Recommendation

In order to make the selection of technical and professional personnel more equitable, efforts should be made under the aegis of the Council of Maritime Premiers to ensure that diplomas and credits within the region will be equated and accepted on a equivalent basis within the Maritime Provinces.

Public Awareness

An integral part of good tourism management is general good will. A visitor may excuse sloppy service in a restaurant but he or she will find it hard to overlook rudeness or apathy wherever it is encountered. Members of the Select Committee were surprised to learn of the potential offered by tourism: the public at large might be more welcoming and hospitable if they were to know exactly what tourism means to Nova Scotia's economic success.

Since tourism is such an important and vital resource which offers so much potential for job creation and community development, Members of the Select Committee believe that the Province should embark upon a public awareness campaign about the value of the industry and the need for all Nova Scotians to be helpful and courteous hosts. This campaign would serve to heighten public sensitivity and would promote better relations between citizens and tourists.

Recommendation

In order to heighten public awareness to the economic

benefits of tourism and in order to ensure that visitors to our province are accorded a friendly welcome, the Province should encourage the development of a public awareness and hospitality component in those advertising campaigns where it is feasible so that all Nova Scotians are made aware of the benefits of both enhanced courtesy to visitors and stronger support to the tourist industry.

Signage and Information

An important component of a welcoming tourist environment is the accessibility to vital information regarding attractions, accommodations and other amenities. No matter how fine the product or service, the potential tourist who is forced to work at finding out directions or hours of operation may simply decide to spend his or her time and dollars elsewhere. Improved highway signage is one way whereby potential tourists could be offered useful information about essential services and attractions. Since the bulk of tourist traffic to Nova Scotia uses our highway system, it is doubly important that visitors be reminded of attractions and amenities which are not visible from the main roads.

Committee Members recognize that increased signage may also pose a threat. If the proper aesthetic balance is not maintained, there is a real danger that the green spaces beside our main roadways will be marred by a conglomeration of ugly and inharmonious billboards. For this reason, the Committee believes it is important for Government to play a major role in the development of a complementary, uniform signage scheme which could add vital tourist information to that currently provided by the Department of Transportation. Since Government signage policy is currently under review, the development of an aesthetically appropriate format for the additional data might well serve as an important first project for the working group

of senior officials which was recommended in an earlier chapter.

Recommendation

In order to ensure that visitors have easy access to an appropriate level of information regarding services, amenities and accommodations, the Senior Officials' Working Group should develop a proposal for expanded signage which will be compatible with the system in current use by the Department of Transportation and which can be implemented as part of that Department's mandate.

Creation of Look-offs

Many areas of Nova Scotia, most notably the Cabot Trail, contain tourist look-offs where visitors may stop for a few moments to enjoy a spectacular or picturesque view. While Committee Members recognize that a proliferation of poorly planned look-offs may prove hazardous to traffic flow, they believe it is important for Government to increase the number of opportunities for visitors to stop and enjoy the Nova Scotia landscape. Area associations might also investigate the possibility of maintaining unmanned information kiosks or plaques at these sites.

Areas of Non-Provincial Jurisdiction

Despite the strong commitment to excellence in Tourism displayed by both the private and the public sector, there are several key areas in Tourism management over which the one in Nova Scotia has direct or indirect control. Customs regulations and air travel schedules lie outside Provincial jurisdiction. Yet an unpleasant or annoying experience at a customs check-point or a circuitous and costly air travel route

can often be responsible for diminished interest in Nova Scotia's tourism product.

Existing air service between Halifax and destinations on the Eastern seaboard of the United States is sporadic and the expanded summer service does not begin until well after our summer shoulder season has begun. Convenience and frequency of travel are essential if Nova Scotia hopes to attract more U.S. visitors to our winter and/or shoulder seasons and if the Province is serious about developing the wilderness/adventure market.

Similarly, inconvenient customs practices can make it difficult for visitors arriving in Eastern Canada by air. This problem is especially annoying for older travellers who must deplane and be processed through Canadian Customs and Immigration at their first point of entry into the country. While the numbers flying in to Halifax may not warrant the special customs arrangements made available to Montreal or Toronto bound travellers, some effort could be made to accommodate the legitimate needs of visitors to this region.

Although the Province has no jurisdiction in either of these questions, the Select Committee urges the Government of Nova Scotia to lobby strongly with the Federal Government to ensure that direct air routes are guaranteed and that improved customs procedures are instituted.

Recommendation

In order to ensure that international travellers arriving by air are offered a greater degree of convenience and service, the Province should lobby with Ottawa to obtain more frequent

and direct air service and to devise more efficient methods of processing visitors through Canadian Customs and Immigration.

TABLE I*

VISITOR PROFILE - DEMOGRAPHY FOR 1984**

	All Visitors	Auto	RV	Air
Volume				
Average Party Size	2.14	2.49	2.68	1.45
Person Trips	1,037,000	693,000	103,000	241,000
Visitor Parties	481,000	277,000	38,000	166,000
Stay (% Parties)				
1 - 5 Nights	68 %	79 %	59 %	54 %
6 - 10 Nights	20	15	28	26
11 - 15 Nights	6	3	8	10
16 - 20 Nights	1	1	2	3
21 + Nights	4	2	2	7
Total Party Nights	2,897,000	1,234,000	242,000	1,421,000
Average Party Nights	6.02	4.58	6.36	8.15
Total Person Nights	5,434,000	2,886,000	598,000	1,950,000
Party Type (% Parties)				
Alone	31 %	11 %	6 %	70 %
Couple	34	41	52	19
Family	16	23	22	4
Group (2 +)	18	26	20	7

* Courtesy of the Department of Tourism.

** Visitor Profile Surveys are conducted in every second year.

TABLE II*

VISITOR PROFILE - PSYCHOGRAPHICS**

May 15 - October 31, 1984***

	All Visitors	Auto	RV	Air
Visitor Parties	481,000	277,000	38,000	166,000
TRIP PURPOSE				
Convention	2%	2%	-	4%
Other Business	15%	6%	4%	31%
Holiday/Pleasure	37%	37%	66%	27%
Visiting Friends/Relatives	35%	40%	18%	33%
Outdoor	1%	1%	-	1%
Passing Through	5%	7%	7%	1%
Other	5%	7%	5%	3%

* Courtesy of the Department of Tourism

** Overnight Travellers Only

*** The visitor profile survey is conducted on a bi-annual basis

TABLE III*

NOVA SCOTIA'S 1985 TRAVEL REVENUES

Total Revenue

600,000,000

Non-Resident Tourist Season Expenditures ($ Millions)	
Same Day Auto	$ 9.4
Overnight Auto	86.7
Air	93.6
Motorcoach	32.4
Rec Veh	16.3
Total	**$ 238.4**
Resident Travel Expenditures ($ Millions)	$ 262.2
Non-Resident Off-Season Expenditures ($ Millions)	$ 99.3
Total	**$ 600**

* Courtesy of the Nova Scotia Department of Tourism

TABLE IV*

VISITOR REVENUE PROJECTIONS

(000's)

	1985	(Projected) 1986	Absolute Change	% Change
AUTO	$ 96,000	$ 99,900	+ 3,800	+ 4%
RV	16,300	15,700	- 600	- 4%
MOTORCOACH	32,400	34,000	+ 1,600	+ 5%
TOTAL	$144,800	$149,600	+ 4,800	+ 3%

* Statistics courtesy of the Nova Scotia Department of Tourism.

RECOMMENDATIONS CONTAINED IN CHAPTER IV

Recommendation IV-1

In order to ensure that Nova Scotia can maximize its access to developmental and multicultural funds available through the Federal Government of Canada and in order to ensure that a complementary management and promotion strategy exists within the Atlantic region, the Province of Nova Scotia should undertake a review of all information and communication linkage which directly or indirectly relates to Tourism. The final aim of this review would be the fostering of renewed ties between provinces in the region and the building of a greater Federal awareness of the particular needs Nova Scotia in the tourism sector.

Recommendation IV-2

In order to serve the needs of local communities, tourists and operators, the Department of Tourism should assume an expanded role in day-to-day tourism management. As a pilot project, the Department should appoint two regional representatives whose job it would be to work in local communities with the area associations in the development and management of ongoing operations and new projects.

Recommendation IV-3

Once the new regional representative system is in place, the Department of Tourism in co-operation with the area associations should take immediate steps to introduce destination specific advertising campaigns which would compliment their generic promotions. This program should be introduced gradually and in time should expand to cover the province with a network of destination/theme options developed in concert with local industry and community agencies.

Recommendation IV-4

Building on the opportunities offered by the regional representative system the Department of Tourism should re-activate its server training program and investigate updating course material to reflect the changing demands of the travelling public.

Recommendation IV-5

In order to make the selection of technical and professional personnel more equitable, efforts should be made under the aegis of the Council of Maritime Premiers to ensure that diplomas and credits within the region will be equated and accepted on a equivalent basis within the Maritime Provinces.

Recommendation IV-6

In order to heighten public awareness to the economic benefits of tourism and in order to ensure that visitors to our province are accorded a friendly welcome, the Province should encourage the development of a public awareness and hospitality component in those advertising campaigns where it is feasible so that all Nova Scotians are made aware of the benefits of both enhanced courtesy to visitors and stronger support to the tourist industry.

Recommendation IV-7

In order to ensure that visitors have easy access to an appropriate level of information regarding services, amenities and accommodations, the Senior Officials' Working Group should develop a proposal for expanded signage which will be compatible with the system in current use by the Department of Transportation and which can be implemented as part of that Department's mandate.

Recommendation IV-8

In order to ensure that international travellers arriving by air are offered a greater degree of convenience and service, the Province should lobby with Ottawa to obtain more frequent and direct air service and to devise more efficient methods of processing visitors through Canadian Customs and Immigration.

V -- DEVELOPING THE RESOURCE

Intoduction

Despite advances and improvements in both marketing and ongoing management, many experts in the tourism sector believe that the industry will not be able to remain competitive unless there are considerable efforts made in program and product creation. This concern was raised in many of the briefs presented before the two Select Committees: some 52 recommendations for increased program development were suggested during the course of the hearings.[1]

Not surprisingly, there was little unanimity in these suggestions except that the Province's overall aim should be the development of a full range of seasonal and "seasonless" activities which would draw out of province and international tourists to Nova Scotia the year round. Some of the recommendations advocated the creation of a special agency to channel development monies to the industry. Some urged the creation of a cultural and nightlife scene and still others called for the determined wooing of the wilderness/adventure market. Many of those making suggestions stressed that the creation of a broader range of tourist/leisure-time activities would benefit not just the visitor but also help to improve the resident tourist trade across the Province.

After considerable research and study, Members of the Select Committee believe that the role of Government in the development and creation of new products and market can be a pivotal one. Accordingly, the Committee has identified three areas where Government can assist industry expansion by improving

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1. See Table I, p. 68

its own operational methods and procedures. Although at least one of these issues has been dealt with at some length in an earlier chapter, Members believe that the question of product development is so important as to merit additional emphasis.

Psychographics/Market Research

In all commercial ventures, market research is held to be the key in the development of a successful and appealing product. Given the sophistication of psychographic[1] tools available in the 1980's, it is imperative that the Department of Tourism amend its visitor profile methodology to identify areas where evolving visitor requirements and wishes can be satisfied. At the present time, it is not possible to say with certainty what specific attractions or activities would bring tourists to Nova Scotia or keep them here for a longer stay: this basic information must be readily available before costly decisions regarding product development are undertaken.

As outlined in Chapter III, improved psychographic research techniques would also result in the collection of more accurate data regarding any necessary changes in day-to-day operational areas such as server training, etc. An additional bonus would be the gathering of information concerning the potential of the resident tourist market - the group which would arguably benefit the most from the introduction of new leisure options. Depending on the socio-cultural needs of this important and lucrative market, (ranging from urban night-life opportunities to longer musical and theatre seasons), a host of new recreational opportunities could be created.

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1. The study of psychographics entails the creation of indepth visitor profiles based on statistical data.

Funding

Obviously, the creation of new products and the development of innovative programming cannot be achieved without cost. As mentioned elsewhere in this Report, many other departments are directly or indirectly involved in the tourism industry. It is essential that some understanding of the true number of dollars spent on tourism in Nova Scotia be determined. Once this has been done, well informed decisions can be made as to how program development priorities can best be set and existing monies allocated.

Given the immense value of the tourism resource to the Province, this preliminary study of funding questions might well reveal that existing support levels are too low to foster successful growth. Should this prove the case, Government should give immediate and favourable consideration to increasing the budget of the Department of Tourism and of those sister agencies which presently contribute to program and product development. The study of the funding arrangements currently in place and an initial estimate of their suitability for development purposes could be a project undertaken by the Senior Officials' Working Group.[1]

The FAM Process

For some years, the Department of Tourism has used the familiarization tour (FAM) process to introduce tour operators, travel agents, convention managers and travel writers to Nova Scotia's tourism product. While the Members of the Select Committee were impressed with the commitment of the FAM team and the wide range of travel articles which resulted from the tours, they

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1. See recommendation III-1.

were less than happy with the serious lack of hard data on the FAM process.

Justifiably, the Department of Tourism is proud of the way in which the miniscule FAM budget of approximately $10,000 per year is doubled or tripled by the strategic use of donated accommodations and federally subsidized travel costs. However if the Department is to pursue aggressively the expansion of market and products, it will have to offer its FAM visitors something more than the traditional view of Nova Scotia. Arguably, slightly longer tours might give travel operators and writers much needed opportunities to sample a broader range of activities and attractions. Since little information is at present compiled regarding the itineraries and activities awaiting the FAM visitor, it is difficult to judge whether the current process does more than reinforce picturesque stereotypes.

As an important step in developing new products and markets and lengthening the tourist season, the Department of Tourism should undertake an immediate review of the FAM process with a view to making it more up-to-date and accurate. The maintenance of a firmer data base is one way in which the success of the FAM process could be monitored more carefully so that accurate and timely information regarding the needs of specialty market segments can be followed.

Recommendation

In order to participate fully and effectively in product and program development, the Department of Tourism should ensure that its psychographic research methodologies, its FAM process and its funding arrangements are as efficient and up-to-date as possible. The maintenance of a more carefully monitored data base in these areas would be a vital step in designing development priorities and needs.

Attractions/Amusements

During the deliberations of the Select Committee, many of those who made recommendations stressed the need to create a broader range of man-made amusements in the Province.[1] Given the results of a recent Federal study which shows that many visitors to Eastern Canada are disappointed at the lack of "fun" activities and entertainments, the question of man-made amusements assumes even greater importance.

Yet the issue is more complex than it first appears. Part of Nova Scotia's undeniable charm lies in its unspoiled, rural character. A few leisure or amusement centres would not jeopardize this character; however, a proliferation of jerry-built "Kiddie-Lands" and "Mini-Golfs" might adversely affect the overall impression which our Province makes on visitors. One option would be for private industry to examine the feasibility of a Sea-World type complex containing exhibits, aquariums and activities geared to a nautical or marine theme. The Select Committee notes with interest current plans under study in Richmond County to build an Acadian model village and associated display complex. This type of enterprise combines multiculturalism with the leisure or fun activities identified as important to visitor satisfaction in the Federal study.

Under the regional representative system which the Committee recommended in Chapter IV, opportunities for the regional development of a major project such as a theme park could be greatly enhanced. Working with the assistance of the regional representative, and the area associations, private sector investors could investigate project feasibility and could be put in

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1. Almost 18% of those who urged new program development advocated increased man-made attractions.

touch with the relevant provincial and federal development programs. This type of large private sector project would not only have the benefit of increasing employment and economic opportunities, but would also help the region in which it was located to keep potential tourists for longer periods and to encourage more frequent visits.

Nevertheless, Committee Members wish to stress the need for the utmost caution in the planning of such enterprises so that the unique local character of the Nova Scotia countryside will not be spoiled. It is imperative that suggested guidelines be developed so that certain aesthetic and commercial standards are met at new amusement centres and attractions. In concert with the area associations, the regional representatives might draw up some recommendations or man-made attractions against which private sector groups could assess the merits and shortcomings of their own plans.

Recommendation

Working with the area associations, the regional representatives should draw up a set of voluntary guidelines for amusement and attraction centre projects which could be used by those private sector groups interested in exploring the potential of this industry.

Cultural Products

While the range of outdoor activities and historic sites makes Nova Scotia a desirable vacation spot during the day, the variety of evening activities is relatively small. The expansion of multi-cultural programming as recommended in Chapter IV would offer interesting options for many but for others, these activities might prove less attractive.

It is an unfortunate fact that in Nova Scotia the cultural season winds down just as the tourism season begins. While the small size of our Province may make the success of a full-fledged summer festival a financial impossibility, the Members of the Select Committee believe that every effort should be made to extend into July at least some components of the cultural season. This lengthening of the season could be done on a trial basis for two years to see if the numbers of tourists patronizing the events would warrant a permanent change. This project could be accomplished at little or no cost simply by postponing the final concerts in the Nova Scotia Symphony season until July and by encouraging local theatre groups to premiere their final plays during the same time period. Of crucial importance to this trial would be the keeping of accurate statistics concerning the provenance of patrons: if the overwhelming majority of them continue to be local residents, then a return to previous scheduling might be indicated.

Recommendation

In order to provide visitors to Nova Scotia with an opportunity to sample a broader range of our Province's cultural activities, theatre and musical groups should be encouraged to extend their seasons. If response proves favourable, considerable thought should be given to the feasibility of lengthening the cultural season on a permanent basis either by judicious scheduling or by mounting additional performances.

Heritage Products

Statistical evidence shows that the number of visitors to Nova Scotia's historic sites is growing yearly and that the

majority of this traffic is from non-residents.[1] Existing data also indicates that as individuals take a greater interest in their ancestry, the demand for heritage-related activities could grow dramatically. While much ground work has already been done to assure Nova Scotia a secure place in the heritage market, these are additional avenues of growth which have not yet been explored.

More participatory and less passive programs are needed to encourage visitors to come to our Province to uncover the monuments of their past. Mention has already been made of the attempts to encourage Scottish and Acadian visitors.[2] Working with the Departments of Culture, Recreation & Fitness and Education, the Department of Tourism should encourage tour operators to offer packages based on heritage themes. These excursions could range from seminars on Family-Tree preparations at the Provincial Archives to a boat builders course in Lunenburg. Ideally, these specific products would attract international interest from a wide variety of age and socio-economic groups.

Building on the evidence of their own statistics, the Nova Scotia Museum Complex and the Art Gallery of Nova Scotia should be encouraged to plan special interpretive and interactive exhibits for the summer and early fall. Mini-classes or demonstrations of rope-making, candle-making and other such lost crafts could be part of the daily programs of the museums during peak periods. These small additions to current practices would do much to help bring Nova Scotia's rich heritage alive to even the most casual visitor.

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1. In 1986, fully 55% of those who visited the Nova Scotia Museum Complex were from out of Province.

1. See page 21

Recommendation

In order to improve the calibre of the heritage related products offered to the visitor, the museum and art gallery should be encouraged to design more inter-active and dynamic summer programs which will allow visitors to become personally involved in some elements of Nova Scotia's historical, cultural or artistic endeavours.

Wilderness/Adventure Products

The potential of Nova Scotia as a world-class wilderness/adventure destination cannot be over-emphasized. Although the current number of wilderness enthusiasts vacationing here is small, the excellence of our parks and trails, the abundance of our wildlife and the moderation of our climate mean that orienteering enthusiasts, hunters and other nature lovers could journey here in virtually every season of the year. Preliminary research has shown that Europeans are very enthusiastic about the type of rugged outdoor opportunities which can be enjoyed throughout rural Nova Scotia.

As mentioned elsewhere,[1] current transportation difficulties make it awkward for oversea and U.S. travellers to visit our Province in the off-season. Should these not insurmountable problems be solved, Nova Scotia might well find that a properly managed wilderness adventure market would prove the pivot around which a viable winter season could be created.

The development of this exacting market which is currently wide open offers many challenges to the private sector. Camp facilities have to be constructed and maintained, tour packages

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1. See recommendation IV-8.

have to be developed and promoted and activity opportunities have to be designed. This is another example of how important the regional tourist representative could be to the industry. Working with the private sector, the regional representative could assist in planning these new projects and in suggesting successful management techniques.

Recommendation

Recognizing the tremendous potential offered by the wilderness/adventure market, the Select Committee urges Government to make the development of this market a priority with a view to creating a viable wilderness/adventure product that can serve as the focal point for the creation of a strong late fall/winter season.

TABLE I

RECOMMENDATIONS RECEIVED FOR CREATION OF NEW PROGRAMS*

PROGRAM	NUMBER	PERCENTAGE
1. Financial assistance/loans	17	32.7%
2. Standardized accommodation system	9	17.3%
3. Building of attractions/amusements	9	17.3%
4. Training/service	7	13.5%
5. Cultural activities	5	9.6%
6. Craft opportunities	2	3.8%
7. Internal Public Awareness campaign	2	3.8%
8. Hiking/Canoeing	1	1.9%
TOTAL	52	** 100

* This table presents the number of recommendations made for the development of New Programs.

** May not equal 100 due to rounding.

TABLE II

NOVA SCOTIA MUSEUMS: VISITOR VOLUME 1985-1986*

(expressed as percentage change)

SITE	% CHANGE INC/DEC
Balmoral Grist Mill	+4%
Barrington Meetinghouse	-18%
Barrington Woolen Mill	+10%
Cossit House	-5%
Dory Shop	-7%
Firefighters Museum of N.S.	+8%
Fisheries Museum of Atlantic	+12%
Fishermans Life Museum	-16%
Haliburton House	+16%
Lawrence House	+7%
Maritime Museum of Atlantic	+38%
Nova Scotia Museum	-17%
McCullough House	+3%
North Hills Museum	+5%
Perkins House	-7%
Prescott House	-9%
Ross Farm Museum	+15%
Ross Thompson House	+7%
Shand House	0%
Sherbrooke Village	+9%
Sutherland Steam Mill	+6%
Uniacke House	+1%
Wile Carding Mill	-28%
Bell Museum	+5%
Louisbourg	+2%
TOTAL	+8%

* Statistics courtesy of the Department of Tourism

TABLE III

PERCENTAGE OF OUT OF PROVINCE VISITORS TO THE N.S. MUSEUMS COMPLEX

SITE	% OUT OF PROVINCE
Balmoral Grist Mill	42
Barrington Meetinghouse	63
Barrington Woolen Mill	73
Cossit House	33
Dory Shop	75
Firefighters' Museum of N.S.	--
Fisheries Museum of the Atlantic	94
Fisherman's Life Museum	63
Haliburton House	54
Lawrence House	47
Maritime Museum of the Atlantic	--
Nova Scotia Museum (Summer St.)	--
McCulloch House	60
North Hills Museum	58
Perkins House	52
Prescott House	50
Ross Farm Museum	--
Ross Thomson House	65
Shand House	33
Sherbrooke Village	--
Sutherland Steam Mill	43
Uniacke House	40
Wile Carding Mill	51
Nova Scotia Museum Complex Total	55

RECOMMENDATIONS CONTAINED IN CHAPTER V

Recommendation V-1

In order to participate fully and effectively in product and program development, the Department of Tourism should ensure that its psychographic research methodologies, its FAM process and its funding arrangements are as efficient and up-to-date as possible. The maintenance of a more carefully monitored data base in these areas would be a vital step in designing development priorities and needs.

Recommendation V-2

Working with the area associations, the regional representatives should draw up a set of voluntary guidelines for amusement and attraction centre projects which could be used by those private sector groups interested in exploring the potential of this industry.

Recommendation V-3

In order to provide visitors to Nova Scotia with an opportunity to sample a broader range of our Province's cultural activities, theatre and musical groups should be encouraged to try a two-year trial project of extending their seasons. If response proves favourable, considerable thought should be given to the feasibility of lengthening the cultural season on a permanent basis either by judicious scheduling or by mounting additional performances.

Recommendation V-4

In order to improve the calibre of the heritage related products offered to the visitor, the museum and art gallery

should be encouraged to design more inter-active and dynamic summer programs which will allow visitors to become personally involved in some elements of Nova Scotia's historical, cultural or artistic endeavours.

Recommendation V-5

Recognizing the tremendous potential offered by the wilderness/adventure market, the Select Committee urges Government to make the development of this market a priority with a view to creating a viable wilderness/adventure product that can serve as the focal point for the creation of a strong late fall/winter season.

VI - CONCLUSION

The implications of the current worldwide boom in tourism are enormous for Nova Scotia. Since our province is so rich in both the human and natural resources essential to success in this vital sector, we can expect that tourism's importance as a vehicle of job creation and economic development will continue to grow until well into the next century. Many efforts have already been made by both the private and the public sector to ensure that this industry remains competitive and up-to-date; nevertheless, there are a number of key areas where urgent reforms are needed to help bring about continued success.

General Policy Statement on Tourism

As Members of the Select Committee outlined in their Interim Report, a general policy statement on the value and role of tourism for Nova Scotia is basic to the change process. Such a statement would underline the priority which Government places upon this industry and would be of benefit to public and private sector alike as they strive to devise a practicable agenda for reform.

The existence of a general policy statement would also be useful for increasing public awareness of the importance of tourism and for encouraging public support for sector projects.

Marketing/Promotions

Both the Interim Report and the Final Report have laid considerable stress on the need for improvements in the marketing/promotions area. As new tourism products become available and as the needs of the travelling public evolve, it is imperative that the Department of Tourism have both adequate funds

and realistic spending guidelines in place. Neither can be achieved without the improved strategic use ofpsychographic methodologies to determine what priorities need to be highlighted in future campaigns. Given the tremendous impact of tourism on the Nova Scotia economy, such research might also effectively demonstrate that increased funding for tourism is the only way in which full market potential can be achieved.

A Senior Officials' Working Group

At the present time there are at least four departments in addition to Tourism which have a direct impact on the way in which the industry operates. Without a focusing mechanism to ensure that developments, promotion and management efforts are coordinated, there is a very real risk that lack of communication between government agencies will translate into missed opportunities. Accordingly, the Select Committee belives it is vital that Government take steps to create a Senior Officials' Working Group comprised of civil servants from those departments which play a role in sector development and/or management. This group could investigate specific questions such as multi-cultural promotion or the lengthening of the season while it also studies areas of general concern such as funding.

The Regional Representative System

Consistent with their call for a renewed Government emphasis on tourism, Members of the Select Committee believe it is important for Government to play an expanded role in sector management and development. One way for Government to assume this responsibility would be by appointing regional representatives of the Department of Tourism who would have a mandate to work with area associations on a broad spectrum of specific issues. As a first step in the implementation of this new

process, the Select Committee urges that a two-year pilot project be commenced which would place regional representatives in the field who would work with the area associations on industry development.

Changes within the Department of Tourism

In addition to the creation of the regional representative system, other changes are needed to ensure that the Department of Tourism is more responsive to the changing requirements of the market. Specifically, improved methodologies must be instituted whereby the potential of the resident tourist market can be tracked and a critical review of the FAM process should be undertaken to ensure that the process is as effective as possible and that its content remains consistent with current priorities. Mechanisms for marketing and development funding should also be studied so that a realistic budget which reflects the value of the resource to the Province can be set.

Product Development

In addition to improvements in marketing and administrative procedures, changes should also be made in the field of product development. Enhanced multi-cultural and heritage activities should be designed and a viable winter season should be created. By building on our Province's strengths, the wilderness/adventure market should be promoted as a vehicle for expansion of the tourism season. Action in all these areas would help Nova Scotia achieve the eventual objective of a year-round season.

The Challenges Ahead

The program for reform which the Select Committee has

developed is an ambitious one, but it is a realistic agenda which can be achieved by a Government committed to sector development. The effects of tourism revenues are felt in virtually every community in this Province; it is only sensible that considerable effort should be expended to optimize the quality and the quantity of this impact. Working together with the private sector, all three levels of Government can build in Nova Scotia a strong foundation for successful development which would carry over into the next century. This goal should be both our short-term priority and our long-term objective.

APPENDIX A

RECOMMENDATIONS OF THE SELECT COMMITTEE ON TOURISM

Recommendation III-1

In the Interim Report, the Select Committee recommended that government undertake an immediate review of all activities which have a direct relationship with the development and promotion of tourism in the Province. In order to facilitate this process and to assist in the development of short-term marketing priorities, the Select Committee believes that the creation of a working group of senior officials from the Departments of Education, Culture, Recreation & Fitness, Lands and Forests and Development should be established under the chairmanship of an official of the Department of Tourism. This working group would strive to ensure that all promotional, marketing and development priorities which impact upon the tourism industry are efficiently and cost effectively implemented and that an up-to-date and comprehensive inventory of all attractions and tourism resources in the province is maintained.

Recommendation III-2

The Department of Tourism should promote more intensively the activities and opportunities open to visitors in the shoulder seasons and should encourage area associations to schedule festival events and special interest projects for these time periods with the long-range view of creating a viable shoulder tourist season.

Recommendation III-3

Working through the regional associations, the Department should encourage the hotel/resort/convention sector to develop

and introduce new products which will result in the lengthening of the season and the broadening of leisure activities available across the Province.

Recommendation III-4

In conjunction with the Department of Lands & Forests, the Department of Tourism should explore the possibility of establishing marked and graded trails for winter activities in provincial parks and in the environs of the provincial resort hotels on the mainland.

Recommendation III-5

Working with the Departments of Agriculture and Development, the Department of Tourism should promote winter opportunities and assist with advice, those entrepreneurs who wish to develop sugar bush activities, sleigh rides and other appropriate seasonal pastimes consistent with the Government's plan to create a province-wide winter season.

Recommendation III-6

As an immediate priority, the Department should begin aggressive promotion and expansion of the wilderness market with a view to expanding Nova Scotia's share of this fast-growing leisure option.

Recommendation III-7

The Department of Tourism should continue to support and actively promote the Nova Scotia Tattoo as one of the province's most renowned tourist attractions and program planners of the Tattoo should be encouraged to continue incorporating performers in the Tattoo schedule who are representative of the province's cultural mosaic.

Recommendation III-8

The Department of Tourism should encourage the growth of more co-operative endeavours with private industry to ensure that all avenues for product promotion are explored.

Recommendation III-9

Given the potential cultural and tourism value of Nova Scotia's multiculturalism festivals, the Department of Tourism should undertake an immediate review of all such festivals and activities held across the Province. The review team should include representatives from the Department, the Multicultural Association of Nova Scotia, the area associations and private industry who will assess the possibilities offered by this developing market and will prepare a recommended action plan for updating, improving and expanding the activities currently offered by the multicultural associations and will suggest ways in which these festivals may be used to expand the spring and fall shoulder seasons.

Recommendation III-10

Once the review team has prepared its recommended action plan, meetings with representatives from the multicultural groups in the Province should be held under the sponsorship of the Department of Tourism to explain the goals of the plan and to suggest ways in which agencies which are willing to participate in the development process can begin to refocus their priorities and long-term goals.

Recommendation III-11

On the basis of the recommendations of the review team, and assistance from the Interdepartmental Working Group, the

Department of Tourism should assess its own priorities in on-site promotion and group specific advertising.

Recommendation III-12

The methodology of the visitor profile and exit surveys should be redesigned so that a more accurate picture of travel patterns in both Nova Scotia and the Atlantic region can be derived. While Committee Members recognize that these changes may result in higher research costs, they believe that the benefits of a complete record more than offsets the anticipated additional costs.

Recommendation III-13

In order to study, develop and promote the resident tourist market more aggressively, the Department of Tourism should consider the adoption of expanded methodologies which would permit thorough charting of this hitherto unexplored market.

Recommendation III-14

In order to improve Nova Scotia's competitive position in the convention trade, the Departments of Development and Tourism should encourage local tourist associations in consultation with Boards of Trade, Chamber of Commerce groups, and other appropriate agencies to conduct objective reviews of services and activities available to prospective conventioneers in their respective communities with a view to upgrading these services as appropriate.

Recommendation III-15

Every effort should be made to encourage local groups and area associations to begin planning as far in advance as

possible so that the most efficient use of performers, advertising monies and promotion can be achieved.

Recommendation IV-1

In order to ensure that Nova Scotia can maximize its access to developmental and multicultural funds available through the Federal Government of Canada and in order to ensure that a complementary management and promotion strategy exists within the Atlantic region, the Province of Nova Scotia should undertake a review of all information and communication linkage which directly or indirectly relates to Tourism. The final aim of this review would be the fostering of renewed ties between provinces in the region and the building of a greater Federal awareness of the particular needs Nova Scotia in the tourism sector.

Recommendation IV-2

In order to serve the needs of local communities, tourists and operators, the Department of Tourism should assume an expanded role in day-to-day tourism management. As a pilot project, the Department should appoint two regional representatives whose job it would be to work in local communities with the area associations in the development and management of ongoing operations and new projects.

Recommendation IV-3

Once the new regional representative system is in place, the Department of Tourism in co-operation with the area associations should take immediate steps to introduce destination specific advertising campaigns which would compliment their generic promotions. This program should be introduced gradually and in time should expand to cover the province with

a network of destination/theme options developed in concert with local industry and community agencies.

Recommendation IV-4

Building on the opportunities offered by the regional representative system the Department of Tourism should re-activate its server training program and investigate updating course material to reflect the changing demands of the travelling public.

Recommendation IV-5

In order to make the selection of technical and professional personnel more equitable, efforts should be made under the aegis of the Council of Maritime Premiers to ensure that diplomas and credits within the region will be equated and accepted on a equivalent basis within the Maritime Provinces.

Recommendation IV-6

In order to heighten public awareness to the economic benefits of tourism and in order to ensure that visitors to our province are accorded a friendly welcome, the Province should encourage the development of a public awareness and hospitality component in those advertising campaigns where it is feasible so that all Nova Scotians are made aware of the benefits of both enhanced courtesy to visitors and stronger support to the tourist industry.

Recommendation IV-7

In order to ensure that visitors have easy access to an appropriate level of information regarding services, amenities and accommodations, the Senior Officials' Working Group should

develop a proposal for expanded signage which will be compatible with the system in current use by the Department of Transportation and which can be implemented as part of that Department's mandate.

Recommendation IV-8

In order to ensure that international travellers arriving by air are offered a greater degree of convenience and service, the Province should lobby with Ottawa to obtain more frequent and direct air service and to devise more efficient methods of processing visitors through Canadian Customs and Immigration.

Recommendation V-1

In order to participate fully and effectively in product and program development, the Department of Tourism should ensure that its psychographic research methodologies, its FAM process and its funding arrangements are as efficient and up-to-date as possible. The maintenance of a more carefully monitored data base in these areas would be a vital step in designing development priorities and needs.

Recommendation V-2

Working with the area associations, the regional representatives should draw up a set of voluntary guidelines for amusement and attraction centre projects which could be used by those private sector groups interested in exploring the potential of this industry.

Recommendation V-3

In order to provide visitors to Nova Scotia with an opportunity to sample a broader range of our Province's cultural

activities, theatre and musical groups should be encouraged to extend their seasons. If response proves favourable, considerable thought should be given to the feasibility of lengthening the cultural season on a permanent basis either by judicious scheduling or by mounting additional performances.

Recommendation V-4

In order to improve the calibre of the heritage related products offered to the visitor, the museum and art gallery should be encouraged to design more inter-active and dynamic summer programs which will allow visitors to become personally involved in some elements of Nova Scotia's historical, cultural or artistic endeavours.

Recommendation V-5

Recognizing the tremendous potential offered by the wilderness/adventure market, the Select Committee urges Government to make the development of this market a priority with a view to creating a viable wilderness/adventure product that can serve as the focal point for the creation of a strong late fall/winter season.

APPENDIX B

THE RECOMMENDATIONS OF THE INTERIM REPORT

Recommendation 1

To guide the development of policies and programs related to tourism, the Select Committee recommends that the Government of Nova Scotia adopt the following general policy statement:

> Tourism makes a major contribution to the provincial economy and offers the potential for continued growth. The Government of Nova Scotia is committed to realizing the benefits of a flourishing tourism industry, and will encourage the development of marketable tourism products and aggressively promote the province as a travel destination. The overall objective is to maximize economic benefits by increasing total tourism revenues. Specific objectives include extending the tourism season, increasing tourist traffic, expanding the length of visitation and increasing tourist spending.
>
> Development and marketing policies and programs will be placed within a strategic framework based on research, consultation, planning, co-ordination and evaluation. This policy is based on the premise that tourism will reach its potential only by means of a thriving and involved private sector. Full co-operation and co-ordination between business and government is the preferred approach to policy development and implementation. Departments of government and different levels of government must work in harmony to realize the objectives of this tourism policy.

Recommendation 2

> That the Government immediately undertake a review of all its activities that have a direct relationship with the development and promotion of tourism in the province. The review should be conducted by a team of public servants and private sector representatives. The review should identify those activities that do relate to tourism,

assess the effectiveness of current priorities and programs in achieving tourism objectives, identify possible policy conflicts, and recommend appropriate action to government that will enhance tourism in the province. The mandate of the review team should be broad. The review team should be given the powers necessary to fully investigate matters of concern to it. Such a review could serve as an earlier focus of activity for the Minister's Tourism Advisory Council, announced in the recent Speech from the Throne.

Recommendation 3

That Check Ins Limited be dissolved and the Check In system be incorporated into the Travel Information Division of the Department of Tourism. To maintain a direct link with its clients, the Department should establish a formal structure for receiving industry comments, complaints and recommendations. This could be accommodated through the Minister's Tourism Advisory Council.

Recommendation 4

That the Government give favourable consideration to an increase, in real terms, in the tourism marketing budget. Effective use of additional funds can be expected to produce increased tourist traffic and consequently increased economic benefits to the province. The Government should consider a sequential increase in the marketing budget that is tied to effectiveness evaluation based on pre-determined performance measures.

Recommendation 5

That the Government provide the Marketing Division of the Department of Tourism with a one-time additional budget allocation equivalent to its anticipated production costs for the subsequent tourism season.

This action should be taken such that production for the 1987 season can commence at the appropriate time to maximize marketing effectiveness in distant markets. If necessary, this recommendation could be implemented by means of an additional appropriation, although inclusion in the 1986-87 vote is preferred.

Recommendation 6

In particular, funding should be made available to Mount Saint Vincent University for its degree program to ensure that the full potential of the program is realized. Mount Saint Vincent should recognize that in its recruitment of a program co-ordinator it will be providing the tourism industry leader in human resource development. It is hoped that the individual selected will accept this challenge with interest and vigour.

Recommendation 7

That the Government take whatever steps necessary to secure the introduction of a standardized accommodation grading system, preferably on a regional basis. Close consultation with industry will be necessary to ensure that their concerns are adequately addressed within the selected system. Participation must be on a voluntary basis. The system selected for implementation must be fair and objective. It should convey accurate, relevant and concisely presented information to the user. The system should also be compatible with the Check In system. Although government financial support will be required in the start-up phase, a private operator for the system should be found.

Hon. Fisher Hudson: Mr. Speaker, I hereby give notice that on a future day I shall move the adoption of the following resolution:

Be it resolved that

(a) This House declares pursuant to the Rules and Forms of Procedure of the House of Assembly that a Select Committee is established to inquire into tourism in Nova Scotia with particular attention to the changing needs and demands of the vacationing public and the continuous encouragement and growth of the tourist industry, and report to this House the observations, opinions, and recommendations of the members of the Select Committee pertaining thereto;

(b) Notwithstanding the usual practices of this House, if the House is not sitting when an interim or final report of the Committee is completed that the Committee report its findings by depositing its report with the Clerk of the House and it shall thereupon be deemed to have been laid upon the Table;

(c) This House declares pursuant to the Rules and Forms of Procedure of the House of Assembly that the Select Committee be composed of such members as the Striking Committee determines, with the first-named member being the Chairman of the Select Committee;

(d) This House declares pursuant to Section 37A of the House of Assembly Act that the Select Committee not be dissolved by prorogation of the House and that the Select Committee is authorized to continue its inquiry after the House is prorogued;

(e) Notwithstanding the said Rules or any rules of the House, the Select Committee of the House is empowered to examine and inquire into all such matters and things as may be referred to the Committee by this House and from time to time report to this House the observations and opinions of the Committee respecting matters and things referred to the Committee and the Committee is further empowered to send for and examine witnesses, papers and records, and to extend to any witness the protection of this House;

(f) The Select Committee is empowered to meet outside of the Province touching on matters pertaining to its study, review and recommendation;

(g) All the powers and privileges under the House of Assembly Act and amendments thereto and the Rules of the House applicable to Standing and Select Committees while the House is in Session shall apply and be of full force and effect during the sittings of the Select Committee;

(h) This House authorizes the Legislature Internal Economy Board on behalf of the Select Committee to employ such members and staff as may be necessary to enable the Select Committee to carry out its duties; and

(i) This House declares that the Legislature Internal Economy Board is authorized to provide the Select Committee, its members and staff with such facilities and funds as are required to carry out their duties and as are provided for by and pursuant to Section 50 of the Public Service Act.

APPENDIX D

ORGANIZATIONS AND INDIVIDUALS WHO PRESENTED BRIEFS TO THE SELECT COMMITTEE ON TOURISM (1985)

August 20, 1985	Department of Tourism	G. D. Brennan Director, Marketing and Promotion Division
		Alex MacLean Director, Travel Information Division
		R. Owen Assistant to the Director Marketing and Promotion Division
		Cliff Way Director, Industry Development Division
		Gary Young Research Analyst Marketing and Promotion Division
October 1, 1985	Tourism Industry Association of Nova Scotia	Gordon Stewart President
December 3, 1985	Central Nova Tourist Association	Donald Andrews Executive Director
	Cape Breton Tourist Association	Donald Blackwood Executive Director
	Antigonish/Eastern Shore Tourist Association	Michael Broomfield Executive Director
	Evangeline Trail Tourist Association	Gale Delaney Executive Director
	Pictou County Tourism Association	Graham Holman Executive Director

December 3, 1985	Tourism Halifax	Michele McKenzie Manager of Tourism
	Yarmouth County Tourism Association	Rob Nickerson Executive Director
	City of Dartmouth Tourism Association	John Till Executive Director
December 10, 1985	Department of Culture, Recreation & Fitness	Marsha Andrews Co-ordinator, Publications/ Promotions
		Allison Bishop Director of Cultural Affairs
	Department of Lands & Forests	Barry Diamond Director of Parks & Recreation
	N. S. Resources Development Board, Dept. of Development	Jud Godin Senior Loans Officer
	Department of Development	Douglas Nicholson General Manager Halifax Metro East
	Department of Education	Gerald McCarthy Deputy Minister
	N. S. Museum, Department of Education	Candace Stevenson Director of Educational Resource Services
	Department of Health	Dr. Wayne Sullivan Administrator, Community Health
November 25, 1986	Department of Tourism	D. Brennan Director, Marketing & Promotions Division
		Bruce Sutherland Co-ordinator, Marketing Services
		Steven Coyle Research
		Michele McKenzie International Gathering of the Clans

APPENDIX E

THE SELECT COMMITTEE ON TOURISM (1982)

Membership

Mr. Brian Young, Chairman
Mr. Billy Joe MacLean, Member
Hon. Bruce Cochran, Member
Hon. Tom McInnis, Member
Hon. Joel Matheson, Member
Hon. Roland Thornhill, Member
Mr. A. M. Cameron, Member
Mr. J. Vincent MacLean, Member
Mr. Guy Brown, Member
Mr. Hugh Tinkham, Member
Hon. Arthur R. Donahoe, Member (Ex-Officio)

Presentations to the Select Committee on Tourism

- Amherst Area Tourist Association
- Annapolis Valley Board of Trade
- Antigonish Chamber of Commerce
- Antigonish/Eastern Shore Tourist Association
- Atlantic Conference on Learning Disabilities
- Attractions Association of Nova Scotia
- Beverage Room Association of Nova Scotia
- Campground Owners Association of Nova Scotia
- Canadian Federation of Chefs de Cuisine
- Canadian Hostelling Association
- Cape Breton Development Corporation
- Cape Breton Tourist Association
- Owen Carrigan
- Central Nova Tourism Association
- City of Dartmouth Tourism Commission
- Cumberland County
- Peter Cummings
- Federation Acadienne
- Federation of Nova Scotia Heritage
- Festival & Events Association of Nova Scotia
- John Forsyth
- Gary Geddes
- Glenghorm Resort Limited
- Halifax Board of Trade
- Halifax Visitors and Convention Bureau
- Honey Hill Motel
- Innkcepers Guild of Nova Scotia
- Clara Jefferson
- Jim Lotz Associates
- Louisbourg District Planning & Development Commission
- Mike Marshall
- McNabs Island Ferry
- Chester Melanson
- Fraser Mooney
- Nova Scotia Designer Craftsmen
- Nova Scotia League for Equal Opportunities
- Nova Scotia Tattoo
- Pictou County Tourist Association
- Regional Civic Centre Commission
- Restaurant and Food Services Association
- Retail Gasoline Dealers Association
- Dr. Narendra Sinha
- Joseph Spears
- Sport Nova Scotia
- Society for Canoe Championships
- South Shore Tourism Association
- Sydney Bicentennial Committee
- Tourism Industry Association of Nova Scotia
- Town of North Sydney
- University College of Cape Breton
- Voluntary Planning
- West Pubnico Tourist Association
- Yarmouth County Historical Society
- Yarmouth County Tourism Association
- The Hotel Association of Metropolitan Halifax